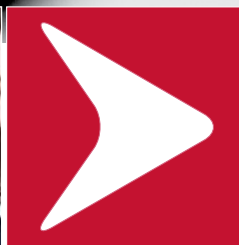


ACTING FOR THE FUTURE



2010 ACTIVITY REPORT

AÉRO 
MONTREAL



ONE OF THE WORLD'S LEADING AEROSPACE CENTRES, ALONG WITH SEATTLE AND TOULOUSE

The Québec aerospace sector is:

- A remarkable industrial concentration of 235 companies;
- Revenues of \$10.9 billion, 80% from exports;
- Nearly 40,000 jobs;
- Rank sixth in sales revenues in aerospace right after the United States, United Kingdom, France, Germany and Japan;
- Ranks first in Québec's R&D manufacturing sector;
- One of the rare places in the world where virtually all the components for a new airplane can be found within a 30 kilometre radius.

MAJOR ECONOMIC LEVERAGE WHICH BENEFITS THRIVE QUÉBEC

The Québec aerospace industry represents:

- 55% of total national production in aerospace
- 50% of the sector's national workforce
- 70% of the Canadian total invested in R&D

AÉRO MONTRÉAL: TO MOBILIZE FOR ACTION

Aéro Montréal, think tank of Québec's aerospace cluster, brings together all decision-makers in Québec's aerospace sector from industry, educational institutions, research centres, associations and unions.

Aéro Montréal's mission is to coordinate the establishment of an environment that enhances the productivity and growth of the sector so that it remains an even more important source of wealth for Greater Montréal, Québec and Canada.

It helps to strengthen the position of Greater Montréal's aerospace industry and ensure its competitiveness with other aerospace centres of excellence around the world.

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CHAIRMAN'S MESSAGE



The year 2010 opened amid a continued slowdown in the global economy. Now recognized as the worst crisis in its history, the aerospace industry saw the sky brighten at the start of the year with a recovery in air traffic, only to have it quickly darken again. A volcanic eruption in Iceland in mid-April slowed the global recovery by hitting airlines in

all regions. More than 100,000 flights were canceled over a one-week period, affecting over 300 airports. This paralysis of air transport was worse than even the damage caused by the attacks of September 11, 2001. Nevertheless, the winds of recovery returned!

Against all odds, air traffic not only recovered, but outshone expectations. In its 2010 forecast, IATA had predicted a loss of \$5 billion for airlines. Instead, they posted a total profit of \$8 billion at the end of the year. Beginning with the Farnborough Air Show, the optimism was palpable and contracts for the aerospace industry once again started to flow in. Many companies benefited from this recovery to replenish their order books.

The good news in the third and fourth quarters, related to many military contracts from suppliers to the Canadian government, allowed Québec's aerospace industry to stabilize its operations and get back on track. The purchase of Hercules C-130J aircraft and Chinook helicopters by the Canadian Armed Forces benefited several companies in Québec. Many companies strengthened their ties with major prime contractors such as Boeing and Lockheed Martin.

Members of Québec's aerospace cluster also laid the groundwork for the recovery. They invested heavily in research and development (R&D) and, taking advantage of the strong Canadian dollar, they made strategic acquisitions that will enable them to ensure their long term international competitiveness.

This recovery raises hopes for better days for our industry. According to the Conference Board of Canada, the production rate is expected to accelerate significantly starting in 2011 to surpass its pre-recession peak by 2014.

In retrospect, the Québec aerospace industry weathered the crisis with resilience and, through Aéro Montréal, members of the cluster worked together to pave the way forward. They focused their efforts on establishing an environment conducive to maintaining our competitiveness and preparing for the return of growth. To do this, the cluster sought to maximize its visibility and thereby ensure a positive image of the sector despite the recession. It worked to raise awareness about the positive impacts of the industry on Québec's economy and the dynamism of its members, making the sector a true symbol of national pride.

Working with its partners, Aéro Montréal implemented structuring initiatives to meet the various issues affecting the aerospace supply chain, including innovation and the development of young talent. These impressive achievements more than ever benefited the industry and reaffirmed the importance of Aéro Montréal's mission as a forum for strategic thinking.

I accepted the mandate to chair the Board of Aéro Montréal, succeeding Marc Parent, President and Chief Executive Officer of CAE, who fulfilled this role with his characteristic determination and passion. I am honoured to be part of this structuring initiative for our sector and to contribute to building an even stronger industry for the economy of Québec and Canada. I intend to devote my energies to its further development.

To conclude, I want to acknowledge the professionalism and dynamism of our CEO and her team. They ensure the cluster's work is performed effectively to the benefit of all industry members.

A handwritten signature in black ink, appearing to read 'Gilles Labbé'.

Gilles Labbé

*Chairman of the Board of Aéro Montréal
President and CEO of Héroux-Devtek*

CEO'S MESSAGE



For the fifth year of its existence, Aéro Montréal and its members more than ever acted strategically and together to ensure the sector's future. The year 2010 was one of intense activity, to put it mildly. The cluster's working groups all evolved with a single purpose: to respond to the challenges of the aerospace industry

and put forward structuring projects that contribute to optimizing the competitiveness, growth and influence of Québec's aerospace cluster. The mobilization of members reached record highs. In total, 190 people participated in different organizations of Aéro Montréal. Through the work of its five working groups, Aéro Montréal was able to significantly increase the number of value added achievements. This, thanks to collaboration among our critical mass of members who acted to improve the collective well-being and support the performance of our industry.

Throughout the year, Aéro Montréal sought to maintain a strong and credible presence in the community and in the public arena. To do this, it collaborated in the publication of five special editorial supplements in the daily *La Presse* and *Journal les Affaires*. These highlighted the dynamism of the aerospace industry and of its members and underscored its position as a true economic driver for Québec.

Since its creation, Aéro Montréal has relied on its three-year communications plan to ensure visibility and strategically support the influence of the cluster. Coming to an end this year, the organization evaluated the effectiveness of these actions and then prepared a new communications plan.

The results of a nationwide survey, conducted in collaboration with the Aerospace Industries Association of Canada (AIAC), showed an improvement in the favourable impression of Quebecers towards the aerospace industry, rising from 54% to 61% between 2007 and 2010. On the innovation front, the cluster has focused on establishing an environment conducive

to technology transfer towards the commercialization of products that generate wealth for Québec and strengthen its position as an innovation hub. Among measures undertaken in 2009, Aéro Montréal was successful in securing an allocation of public-private financing of \$150 million over a four-year period for the greener aircraft catalyst project. This visionary program, supported by the Québec government, is similar to the European CleanSky program and provides support for five technology demonstration projects critical for the long-term competitiveness of our industry.

Again this year, the cluster has been especially active in terms of enhancing the global competitiveness and efficiency of the Québec supply chain. The activities of the Supply Chain Development working group and its sub-committees oversaw the launch of a unifying model unprecedented in our industry, the MACH initiative.

In a similar vein, Aéro Montréal organized, during *Aéromart Montréal* in April, the first ever Global Supply Chain Summit. This brought together a dozen experts in the supply chain and 260 participants from the Canadian and international aerospace industry. During the year, Aéro Montréal met challenges related to aerospace succession by developing an initiative to promote young people's interest in aerospace careers. Deployed in the city of Longueuil, the series of "The sky is the limit!" science presentations reached a dozen elementary schools and over 750 Grades 5 and 6 students.

Finally, the new National Security and Defence working group officially started its activities and focused on developing a strategic plan for defence to maximize the impact of military procurement by the Government of Canada.

I'd like to conclude by thanking all members of Aéro Montréal who maintained the momentum and hard work for the benefit of all. I also want to recognize our donors for their continuing involvement and their unique contribution, without which the impact of our actions could not be as effective.

Suzanne M. Benoit
Chief Executive Officer

BOARD OF DIRECTORS



Gilles Labbé*
Chairman of the Board
President & Chief Executive Officer
Héroux-Devtek Inc



Patrick Champagne
Vice President, Cockpits
and Systems Integration
Esterline CMC Electronics Inc.



Sylvain Bédard*
Vice Chairman of the Board
President
L-3 Communications MAS



Clément Fortin
Chief executive Officer
CRIAQ



Guillermo Alonso Jr*
President of the Executive Committee
President
Alta Précision



Hélène V. Gagnon
Vice President, Public Affairs,
Communications and Corporate
Social Responsibility
Bombardier Aerospace



Yves Beauchamp
Chief Executive Officer
École de technologie
supérieure



Denis Giangi
Director, Taxation and
Government Relations
Rolls-Royce Canada



Jean Blondin*
General Manager & Vice President
Production
Messier-Dowty Inc,
SAFRAN Group



Michel Grenier
Senior Vice President,
General Manager, Regional
and Business Aircraft,
Aerospace Division,
Thales Canada inc.



Serge Brasset
Director
École nationale d'aérotechnique



Philippe Hoste
Chief Executive Officer
Sonaca Montréal



Barry Kohler
President
**Bell Helicopter
 Textron Canada
 Limited**



John Saabas
President
Pratt & Whitney Canada



Jerzy Komorowski
Director General
**Institute for Aerospace
 Research National
 Research Council
 CNRC**



Hon. Jacques Saada
President & CEO
AQA



Claude Lessard
President
Delastek Inc.



Hélène Séguinotte*
Chief Executive Officer
**Turbomeca Canada
 National Executive
 Safran Group**



Mario Bouchard**
Assistant Deputy Minister
**Ministère du Développement
 économique, de l'Innovation
 et de l'Exportation**



Jacques Ouellet
General Manager
Les Outils Arpex



Gérald Tremblay
*Grand Lodge
 Representative*
IAMAW



François Delorme**
Executive Director
**Quebec Region
 Regional Operations Sector
 Industry Canada**



Marc Parent
*President & Chief
 Executive Officer*
CAE Inc.



Serge Tremblay
Executive Director
CAMAQ

Communauté
 Métropolitaine
 de Montréal**



Josée Péloquin
Director
ÉMAM

* Executive Committee members

** Permanent government observers



SHAPING THE FUTURE

Aéro Montréal, Québec's aerospace cluster, was created by the aerospace sector as a think tank for all key players in the industry. By doing so, the industry is working together to optimize its performance, growth and influence. By ensuring coherence and cohesion in its interventions and development activities, the entire industry is benefiting and its world leadership is being maintained.

The cluster's concerted actions are especially effective during economic downturns. Despite encouraging signs of a recovery in the air transportation sector and, therefore, the aerospace industry, economic conditions were not resulting in resumed growth in 2010. Yet, despite this, members of the aerospace cluster acted together to meet the challenges and ensure the sector's future. This future, which we are shaping, is a promising one for the next generation and is a growing symbol of national pride. It champions innovation ensures the competitiveness of companies all levels of the supply chain, and targets lucrative contracts resulting from Canadian military purchases.

Through its mobilization efforts, Aéro Montréal continues to be an agent for action and change through the launch of major structuring and strategic projects that will ensure the competitiveness of our industry.

Mobilization that spurs action

Through its various committees and working groups, 190 aerospace executives and specialists contributed directly to the advancement of Aéro Montréal in 2010. The administrators and members of the working groups, all equally passionate about aerospace, shared their knowledge and expertise to develop strategies and take concerted actions to benefit the entire industry. These initiatives will shape an environment conducive to the development, growth and influence of the aerospace industry now and in the future.

Board of Directors

The Board of Directors (BOD) of Aéro Montréal manages the affairs of the Corporation. It is composed of leading aerospace company and institutional executives or their designated representatives. There are 25 members who fully represent the diversity of Québec's aerospace sector: prime contractors, OEMs, integrators and MROs, subcontractors and institutions (associations, education and research institutions, unions).

In fiscal 2010, Gilles Labbé, President and CEO of Héroux-Devtek, was Chairman of the Board of Directors. Sylvain Bédard, President of L-3 Communications MAS, served as Vice-Chairman for a fifth consecutive year. Jean Blondin of Messier-Dowty served as Treasurer and Suzanne M. Benoît, CEO of Aéro Montréal, as Corporate Secretary.

Gilles Labbé was appointed in April 2010, during the annual general meeting, succeeding Marc Parent, President and CEO of CAE Inc. who had served as Chairman since October 2008.

The Human Resources Committee, chaired by Sylvain Bédard, and the Audit and Policies Committee, chaired by Jean Blondin, helped the board to perform its core job and contributed to good governance of the organization.

During the year, new members joined the Board of Directors. Changes taking place during the year included Clément Fortin, President-Director General of CRIAQ, ex officio member following the departure of André Bazergui of CRIAQ, and Denis Giangi, Director, Taxation and Government Relations, Rolls-Royce Canada, replacing Michel Toutant who resigned. Government observers were Mario Bouchard, Assistant Deputy Minister, Direction General of strategic sectors and economic projects, Ministry of Economic Development, Innovation and Export (MDEIE), and François Delorme, Executive Director, Québec region, Industry Canada, succeeded, respectively, Madeleine Caron and François Marcoux.

In 2010, the cluster's Board of Directors held 5 meetings (Appendix B – Chart of contributions in kind per sector 2010).

Executive Committee

The Executive Committee exercises all the powers of the Board of Directors for the ongoing administration of affairs of the Corporation. The Executive Committee's specific mandate is to report on its activities at board meetings and to formulate advice and recommendations for board policies and decisions.

The committee is composed of five members and chaired by Guillermo Alonso, President of Alta Precision. The Executive Committee met 6 times in fiscal 2010 (Appendix B – Chart of contributions in kind per sector, 2010).

General Management

Suzanne M. Benoît has been CEO of Aéro Montréal since its inception in 2006. In this position, she oversees the implementation of decisions and directions taken by the Board of Directors and the Executive Committee. She assures the management and coordination of activities of the cluster's various working groups and work committees and reports to administrative organizations.

During 2010, the CEO was supported by an experienced team composed of Martin Lafleur, Project Director, Pierrette Daigle, Executive Assistant and Project Coordinator, Amélie Hudon, Senior Communications Advisor, and Martin Hamel, external consultant and project manager of the MACH initiative.

WORKING GROUPS

2010 WORKING GROUPS
Branding and Promotion
Innovation
Supply Chain Development
Human Resources
National Security and Defence

The working groups, composed of representatives from Québec's aerospace industrial sector and the institutional sector representing associations, unions and government, are dedicated to areas of intervention identified in Aéro Montréal's strategic plan, namely to the issues which the aerospace industry wants to address.

Each one conducts an analysis of its particular area and proposes to various Aéro Montréal organizations structuring projects or activities that directly correspond to the directions laid out in the cluster's strategic plan. Each working group is therefore created for a specific period and objectives. At the end of the mandate, the Board may decide to renew it if there is a need to continue for another term. The working groups are managed using a methodology adapted from Six Sigma and are equipped with a rigorous and accountable operating process. This process ensures sound management of the work being performed and regular accountability to the Board.

Branding and Promotion: A SYMBOL OF PRIDE TODAY AND TOMORROW



Our aerospace industry enhances Québec's profile on the world stage and increasingly represents a symbol of national pride for Quebecers.



Despite the global economic slowdown, the aerospace industry remains a symbol of the future. It generates significant economic activity, provides tens of thousands of quality jobs, and is recognized for its leadership in R&D.

Aéro Montréal created the Branding and Promotion Working Group in 2006 with the goal of raising awareness about the Québec aerospace sector. Composed of 11 professionals, mainly in communications, the working group aims to give the Québec aerospace cluster a brand and to carry out an integrated communications strategy that will increase its visibility and influence.

During the past four years, the working group has increased strategic actions and achievements in terms of visibility and communication for the sector. And these actions have paid off! Aéro Montréal has quickly built a reputation with several audiences in Québec, Canada and internationally. Moreover, according to a recent survey, Quebecers have an increasingly favourable impression of the aerospace industry.

As chair of the Branding and Promotion Working Group, I would like to stress the important contribution made by cluster members to the advancement of structural and strategic projects for our industry. The dynamism shown by the industry is truly inspiring and helps to make us all increasingly proud. It is by spreading the word, both locally and internationally, that we will raise awareness about Québec's expertise and know-how.

Hélène V. Gagnon

Chair of Aéro Montréal's Branding and Promotion Working Group

Vice-President, Public Affairs, Communications and Corporate Responsibility, Bombardier Aerospace

MEMBERS OF THE BRANDING AND PROMOTION WORKING GROUP

CHAMPION

Hélène V. Gagnon
Vice President, Public Affairs, Communications and Corporate Social Responsibility
Bombardier Aerospace

Nathalie Bourque
Vice President, Public Affairs and Global Communications
CAE inc.

Josée Gaulin
Marketing & Communications Senior Specialist
L-3 Communications MAS

Cynthia Garneau
Director, Corporate Affairs
Bell Helicopter Textron Canada Ltd.

Nancy German
Vice President, Communications
Pratt & Whitney Canada

Christiane Gosselin
Director, Corporate Affairs and Communication
ENA

Joe Marcheschi
Director, Export Sales
Avior Integrated Products

Hon. Jacques Saada
President & CEO
AQA

Hélène Séguinotte
National Executive
SAFRAN

Bernard Strauss
directeur par intérim, Direction des équipements de transport
MDEIE

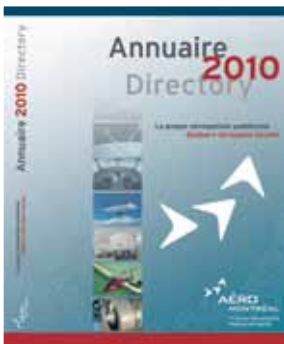
Serge Tremblay
Executive Director
CAMAQ

The Working Group periodically issues recommendations on issues related to the image of the aerospace sector to other members of Aéro Montréal and ensures cohesive actions in the area of communications.

The Working Group held a total of 4 meetings in 2010 (Appendix B – Chart of contributions in kind per sector 2010).

WORKING GROUP ACCOMPLISHMENTS

In 2010, the Branding and Promotion Working Group strived to maintain a positive image of the sector, which was still being affected by the economic crisis. It increased its communication activities aimed at reaffirming the dynamism, expertise and know-how of cluster members and thereby consolidate its position as a major economic driver for Québec.



Cluster 2010 Directory

At the beginning of the year, Aéro Montréal issued the first-ever Directory of the Québec aerospace cluster. This reference tool promotes the industrial capacity of Québec's aerospace sector and supports representation efforts both locally and

internationally. The leading guide of Québec suppliers, the 2010 Directory is available in print and online on the website of Aéro Montréal. This user friendly, interactive research tool was distributed to various targeted local and international audiences during the year

2010 Annual General Meeting

In April 2010, Aéro Montréal held its 5th Annual General Meeting which was attended by 150 people. On this occasion, Minister Clément Gignac presented the Québec government's and MDEIE's policies regarding the aerospace sector. Members of the press were invited to a conference unveiling a White Paper on the 2009 Aerospace Innovation Forum. Several in-depth articles were published after this event.



John Saabas, President of Pratt & Whitney Canada, Marc Parent, President and CEO of CAE, and Gilles Labbé, Chairman of Aéro Montréal and President and CEO of Héroux-Devtek, at the 2010 Annual General Meeting, attended by Minister Clément Gignac.



3rd Aerospace Sector Journal

In the fall, the working group published the 3rd Québec Aerospace Sector Journal, devoted to the new greener aircraft mobilizing project. The four page newsletter presents major issues related to innovation and the five technology demonstration projects. The newsletter was launched in late November

at the 2010 France-Québec Symposium in Bordeaux and at the Aerospace Innovation Forum in Toulouse.

Deloitte study and survey of Pan-Canadian perception

In the fall of 2010, Aéro Montréal participated in a study commissioned by the AIAC on the strategic and economic impacts of the Canadian aerospace industry. This study, by Deloitte & Touche, was presented at the Annual General Meeting of the AIAC to more than 350 participants.

Aéro Montréal also assisted the AIAC in preparing survey questions for a Pan-Canadian perception survey. Based on the survey conducted by the cluster in 2007, this allowed us to compare and evaluate the performance of Aéro Montréal's communication actions. According to this comparative analysis, it is possible to conclude that the favourable impression of Quebecers toward the aerospace industry is improving. In the 2010 survey, 61% of Quebecers have a good or excellent impression of the industry compared with 54% in 2007. Moreover, Quebecers have a more favourable impression than Canadians overall. Some 54% of Canadians had a good or excellent impression of the aerospace industry in 2010.

To some extent, it is possible to say that Aéro Montréal's communications actions have contributed to Quebecers' improving perception of the aerospace industry. The data collected formed the basis of analysis for the 2011-2013 triennial communications plan.

2011-2013 Communications Plan

At year end, the working group wrote a new communications plan for the period 2011-2013. This aims to frame, systematize and energize Aéro Montréal's various communications actions in order to maximize the impacts and achieve the cluster's communications objectives. A draft of the communications plan was submitted to the Board at year end and the final plan was endorsed by the Executive Committee in early 2011.

Standardization of Aéro Montréal's visual platform

Finally, Aéro Montréal's image was reviewed in its entirety to maximize its effectiveness and increase brand recognition. The organization's logo was changed and a new graphics platform developed. Now standardized, it is contained in a graphics standards guide that will govern production of Aéro Montréal's future communication tools to reflect, consistently, the image of the cluster's brand.





Public interventions

During 2010, Aéro Montréal acted as the sector's media spokesperson regarding comments on aerospace industry news, articulated the sector's position on various issues and highlighted its dynamism by announcing various cluster projects. In all, more than 100 articles referred to Aéro Montréal during the year compared with 48 in 2009, an increase of 110.4%.



Special supplements

Throughout the year, the Working Group collaborated in the publication of five (5) special editorial supplements in the daily La Presse and Journal Les Affaires. Devoted to aerospace and priority issues of its working groups – human resources, innovation, supply chain – these inserts raised the discourse above everyday news and were intended to highlight the dynamism of Québec's aerospace industry to the general public.



Local representation, influence and international collaborations

During 2010, Aéro Montréal had a high profile in representing and promoting Québec's aerospace cluster on both the local scene and abroad. Aéro Montréal represented the sector in various local events, such as the announcement of the arrival of a Challenger flying hospital at ÉNA for training purposes, announcements of contract awards to Héroux-Devtek and Pratt & Whitney Canada for the F-35 in the presence of Ministers Rona Ambrose and Denis Lebel, and the announcement of the inauguration of the Mirabel global flight testing centre by Pratt & Whitney Canada. Aéro Montréal also participated in ministerial roundtables in the presence of ministers Peter Van Loan and Denis Lebel.



Internationally, Aéro Montréal strengthened inter-cluster collaborations. In July 2010, as part of the Farnborough International Air Show, Aéro Montréal signed a collaboration framework agreement with the UK aerospace cluster, North West Aerospace Alliance (NWAA) in the presence of Minister Clément Gignac. This agreement aims to initiate special relationships and enhance information exchanges regarding optimization of the supply chain. As part of this new collaboration, Aéro Montréal hosted Martin Wright, managing director of NWAA, in the fall. In addition, Aéro Montréal co-chaired, with AQA, Aéro Mart Montréal 2010. This event was an opportunity to strengthen existing collaborations with international clusters such as Midi-Pyrénées and Aquitaine, Aerospace Valley, and the aerospace cluster of Pouilles, Distretto Aerospaziale Pugliese.



Finally, Aéro Montréal participated in the 2010 France-Québec Symposium and the 2010 Toulouse Aerospace Innovation Forum. These two events have again strengthened the commitment to intensify Québec-France cooperation formalized by the signing of a letter of intent between Aéro Montréal and Aerospace Valley in 2007.

Innovation Working Group:

INNOVATE FOR THE AIRCRAFT OF THE FUTURE



Innovation and investment in research and development (R&D) are central to the aerospace industry's global competitiveness, especially in a context where the level of competition is intensifying.



The Canadian industry faces increased competition from emerging countries, such as China and India, who are investing heavily in their manufacturing sectors. In addition, the global competitive landscape is now dominated by environmental protection and requires the development of more energy efficient and less polluting aircraft. Therefore, Europe and the U.S. are investing heavily in new technologies for these aircraft.

The Québec aerospace sector, a global centre of excellence, has the confidence of the major aerospace prime contractors and its capacity for innovation is recognized worldwide. Despite these strengths, the industry must intensify its efforts in innovation to maintain its position. It was this in mind that Aéro Montréal created the Innovation Working Group in 2006. Composed of 18 R&D and innovation professionals, the working group defined a strategy for aerospace innovation and an action plan for Québec and is establishing and coordinating projects that support this strategy.

Over the past four years, its achievements have been numerous and impressive. Working Group members have supported, in collaboration with CRIAQ, basic and pre-competitive research at the university level and in research centres. They established recommendations and courses of action to improve alignment of training with the needs of employers and to increase the innovation capacity of all links in the supply chain. In addition, they successfully launched an initiative aimed at technology transfer towards the commercialization of products that generate wealth for Québec. As Chairman of the Innovation Working Group, I am proud of the actions of our cluster and its members around a critical issue: the development of our capacity to innovate. By continuing our efforts and speeding up the implementation of mobilizing projects in the area of innovation our sector will be able to reach new heights.

François Caza

Chair of Aéro Montréal's Innovation Working Group

Vice President and Chief Engineer, Bombardier Aerospace

INNOVATION WORKING GROUP

CHAMPION:
François Caza
*Vice President & Chief Engineer
Bombardier Aerospace*

Stéphane Blais, Eng.
*Project Director,
Flight Operations
Marivent*

Patrick Champagne
*Vice President Cockpits
and Systems Integration
Esterline CMC Electronics*

Pascal Désilets
*Chief Executive Officer
CTA*

Pierre Dicaire
*Chief Executive Officer
CTFA-CNRC*

Clément Fortin
*President and CEO
CRIAQ*

Patrice Gauvin
*Vice President,
Business Development
Héroux-Devtek*

Fassi Kafyeke
*Director Strategic
Technology
Senior Engineering Advisor
Bombardier Aerospace*

Dominique Leroy
*Sector Officer
Aerospace, Defence
and Marine
Industry Canada
(observer)*

**Lorenzo Marandola,
Eng., PMP**
*Director, Business &
Technology Development
L-3 Communications MAS*

Mario Modafferi
*Executive Director,
Research & Technology
Pratt & Whitney Canada*

Philippe Molaret
*Vice President Operations
Thales Canada Inc.*

Hany Moustapha
*Professor and Director
of Aerospace Programs
Ecole de technologie
supérieure, Senior
Technology Advisor
Pratt & Whitney Canada*

Marius Paraschivoiu
*Professor and Director CIADI
Mechanical and Industrial
Engineering
Concordia University*

Normand Raymond
*Industrial advisor
Direction des équipements
de transport
MDEIE
(Observer)*

Pierre Rioux
*Manager, Research
& Development / Directeur,
Bell Helicopter Textron
Canada Ltd*

Marc St-Hilaire
*Vice President
Core Engineering
CAE inc.*

Stephen Yue
*Professor - Department
of Mining and Materials
Engineering
McGill University*

The mandate of the Working Group encompasses all facets of aerospace innovation from concept to commercialization, private research (R&D and continuous improvement), public and university research (with the collaboration of CRIAQ). To do this, it works with several organizations involved in innovation and ensures each one's efforts are optimized.

The working group held a total of 6 meetings in 2010 (Appendix B - Chart of contributions in kind per sector 2010).



WORKING GROUP ACCOMPLISHMENTS

In 2010, the Innovation Working Group devoted its efforts to enabling the cluster to further develop its innovation capacity. It strived to establish an environment conducive to maintaining investment in R&D and sharing technology projects leading to strengthening its position as an innovation hub, ready to face the challenges of tomorrow.

Aerospace Innovation Forum White Paper

At the start of 2010, members of the Innovation Working Group wrote a White Paper on the 2nd Aerospace Innovation Forum, which was held in Montréal on December 7 and 8, 2009. This event, organized by Aéro Montréal in collaboration with CRIAQ, brought together more than 400 participants from the Québec, Canadian and international aerospace industry, universities and research centres, policy makers, students and trade journalists. More than 50 major international company experts and researchers in aerospace innovation were featured in the Forum program.

Held under the theme “Aerospace Clusters: a World of Innovation”, the event allowed the sector to identify global trends in aerospace innovation and develop courses of action for the industry so that it remains competitive with international competition. Four major recommendations emerged to guide the industry’s innovation strategies:

1. Encourage and deploy investment in major initiatives;
2. Resolutely make the transition to sustainable development;
3. Integrate SMEs in the global supply and innovation chains;
4. Strengthen the various local and international links of the Aéro Montréal cluster.

These recommendations were listed and detailed in the White Paper on the 2009 Aerospace Innovation Forum which was officially presented at a press conference by François Caza, Chairman of the Innovation Working Group and Vice-President and Chief Engineer, Bombardier Aerospace, during Aéro Montréal’s Annual General Meeting in April 2010.





Aéro Montréal, leader of the Québec delegation of the aerospace centre of excellence at the 2010 France-Québec Aerospace Symposium, with Premier Jean Charest and France's Minister of Economy, Finance and Industry, Christine Lagarde.



Renewal of QRIS

Following a rigorous consultation process, the Québec government announced on June 28 the new Québec Research and Innovation Strategy (QRIS). QRIS 2010-2013 aims to leverage the considerable efforts initiated in the first QRIS while accelerating the transfer of technology from our universities and research centres to companies and, ultimately, to the international commercialization of our best ideas.

To do this, the new QRIS proposes, among other things, five mobilizing projects, including the Greener Aircraft Catalyst Project. This project, financed over four (4) years, for five technology demonstration projects, is the result of recommendations made in a brief presented by the Innovation Working Group during the process of updating the QRIS in 2009.

With the visionary commitment of the government, Québec is following the lead of large framework programs of the European Union and the United States in technology demonstrators. Highlights of the Greener Aircraft Catalyst Project are featured in a special section of this activity report on page 16.

Aerospace Centre of Excellence

Derived from the recommendations of Aéro Montréal's brief for the renewal of QRIS, the working group studied the establishment of an aerospace centre of excellence. Inspired by the Xworx concept of major aerospace OEMs, the initiative aims to encourage collaborative research projects, foster the open innovation process in Québec's aerospace industry, and develop new technologies. To do this, infrastructures must be developed to locate and run work teams on joint projects. Studies on this project have started. To this end, various options will be studied during the year 2011.

2010 France-Québec Symposium

As leader of the Québec delegation from the aerospace centre of excellence, Aéro Montréal participated in the Second Symposium of the French competitive clusters and Québec centres of excellence, held in Bordeaux on November 24 and 25 and in Paris on November 26. The 2010 France-Québec Symposium, co-organized by MDEIE and its French counterpart, aimed to establish linkages between the Québec centres of excellence and French competitive clusters to accelerate the development and implementation of new technology and industrial and business partnerships among the various participants. The topics covered during discussions and conferences in Bordeaux were sustainable development, human capital and unmanned vehicles (drones) and satellites.

At this event, 25 participants from Québec's aerospace sector, representing contractors, SMEs, research centers and universities, met the French delegation led by the Midi-Pyrénées and Aquitaine Aerospace Valley. Aéro Montréal facilitated five partnership agreements and a list of four exploratory projects between members of the Québec aerospace cluster and French companies, research institutions and schools. To confirm their intentions, the various Québec and French players signed agreements in the presence of Premier Jean Charest and France's Minister of Economy, Finance and Industry, Christine Lagarde, during the event's closing ceremony.

Aerospace test platform

The Innovation Working Group endorsed a project to implement and use jointly an aerospace test platform proposed by CAMAQ, i.e. the Québec Aerospace Integrated Systems Teaching Laboratory (LESIAQ in French). These facilities, provided by Bombardier Aerospace and Bell Helicopter Textron Canada and located in the premises of ÉMAM, will benefit students who are preparing for a career in aerospace. Recognizing this initiative as being in line with the recommendations of the 2008 Summit on aerospace industry engineers and specialists training, the Working Group prepared a letter of support for the project which was endorsed by Aéro Montréal's Board of Directors.



Innovation Working Group Action Plan 2011-2013

To frame the group's work over the next three years, members have drafted a new action plan covering the period 2011-2013. The action plan, based on the recommendations of the 2007 and 2009 Aerospace Innovation Forums and the 2008 Summit on aerospace industry engineers and specialists training, responds to four (4) objectives:

1. Ensure the competitiveness of our industry through innovation.
2. Exchange and validate information to align actions and optimize the use of public and private funds.
3. Ensure the cohesion of initiatives in innovation.
4. Develop a culture of innovation in companies by encouraging them to hire engineers.

To this end, five areas of intervention have been established:

1. Obtain federal government support for new aerospace innovation initiatives.
2. Take leadership to strengthen sustainable development and define courses of action to encourage social innovation.
3. Assess infrastructure integration needs (centre of excellence in innovation) in an evolving innovation context.
4. Make an inventory of innovative companies, including SMEs, with the aim of increasing the capacity for innovation.
5. Tag practices in innovation and apply best practices.



THE GREENER AIRCRAFT CATALYST PROJECT

Five technology demonstration projects will support the Québec aerospace innovation chain and contribute to the long-term conservation of our environment.

As recommended by the 2007 Aerospace Innovation Forum, the industrial members of the Innovation Working Group have launched a program designed to accelerate company research to develop what we call the “greener” aircraft. Finally endorsed in the new 2010-2013 QRIS and given a private-public budget of \$150 million over four years, funded 53% by industry and 47% by the Government of Québec, the Greener Aircraft Catalyst Project is based on five strategic technology demonstrator projects.

With this project, the Québec aerospace industry has been given the task of laying the foundations for the plane of the future, i.e. a greener aircraft equipped with intelligent systems, less costly to build and more efficient and effective. As part of the five demonstration projects, the cluster members are seeking to develop aircraft which, by incorporating several new technologies, will be lighter, more efficient, quieter and produce less carbon. As a result, the industry is following the lead of various framework programs of the European Union and the United States and acting to maintain its advantage by developing, starting now, technology that could be used on aircraft with a reduced environmental footprint, and therefore, enjoy a major competitive advantage. In addition, the industry is actively involved in conserving our environment, which responds to a vital need in our society.

The Greener Aircraft Catalyst Project will also support the Québec aerospace innovation chain. Following the steps of basic and pre-competitive research, the technology demonstration phase is an essential link for transferring this technology to the commercialization of products that will create wealth for Québec, which completely satisfies the objectives of the new QRIS. Moreover, by fostering linkages with innovative SMEs, this project will make the Québec industry more competitive by allowing these companies to move up in the global manufacturing network and position themselves on platforms of the future. This is a great opportunity for these SMEs to develop new expertise that they can use on other platforms, including for export.

THE GREENER AIRCRAFT CATALYST PROJECT	
Areas of Specialization	Companies
Aircraft fuselage structures in composite material	Bombardier Aerospace Bell Helicopter Textron Canada
Fuel efficient engine	Pratt & Whitney Canada
Integrated avionics for cockpit applications	Esterline CMC Electronics
Integrated avionics systems for critical systems	Thales Canada
Landing gear of the future	Héroux-Devtek

Aircraft fuselage structures in composite materials

Led by Bombardier Aerospace and Bell Helicopter Textron Canada, this project will build lighter fuselages for better energy performance and therefore reduce carbon emissions. In four years, the goal is to master new advanced technologies for assembling a carbon fibre composite fuselage in an automated and competitive way.

Fuel efficient engine

The development of an engine that is fuel efficient is central to efforts to develop greener aircraft. Led by Pratt & Whitney Canada, this project will, among other things, develop a new and ultra efficient high pressure compressor to make engines more efficient.

Integrated avionics for cockpit applications

Esterline CMC Electronics will work on developing cockpit technologies that will improve navigation performance and help to better predict landing time to reduce differences in distance between aircraft and operate more effectively in harsh weather conditions. By doing so, it will be possible to save fuel and reduce the industry's energy footprint.

Integrated avionics systems for critical systems

Thales Canada will develop an electronic platform capable of integrating an aircraft's critical functions and network them. Through this integration, it will be possible to have more intelligent aircraft that are more electric, lighter, more durable and adaptable throughout their useful life.

Landing gear of the future

Héroux-Devtek will work on developing a lighter, more durable landing gear that offers greater resistance to corrosion. The landing gear will also be quieter and smarter. It will be equipped with sensors in real time which will acquire data, optimize performance and use, and extend its life.

Creation of the Greener Aircraft Catalyst Project Coalition

In 2010, Aéro Montréal contributed to the establishment of new legal organization: the Greener Aircraft Catalyst Project Coalition. During the year, Aéro Montréal's management incorporated the organization, deposited letters of patent and legal documents. The board of directors, on which Suzanne M. Benoît sits, was formed and the general regulations ratified. The organization was officially launched on September 14, 2010 and now manages the implementation of five projects. Fassi Kafyeke, Director, Strategic Technologies, Senior Advisor, Engineering at Bombardier Aerospace, has been appointed Chairman of the Board of Directors.



Members of the Board of Directors of the Greener Aircraft Catalyst Project Coalition.

Supply Chain Development Working Group: MAXIMIZING LONG TERM PRODUCTIVITY



The global aerospace supply chain is rapidly changing. The challenges posed by this transformation are major, but also offer great opportunities for the Québec industry, which is recognized for the expertise and ingenuity of its members.



In a context of globalized world markets, prime contractors are reducing the number of their suppliers, preferring to work with a few intermediary companies that offer integrated solutions and manage numerous subcontractors. Consequently, the global supply

chain is changing, favouring the emergence of integrators who are entrusted with the responsibility for design, fabrication and assembly of complete systems.

To maintain its leadership position, our industry now has to constantly adapt and innovate to provide an integrated supply chain that is more flexible and aligned with the expectations of prime contractors. Suppliers need to improve their operating practices, increase their innovation capacity, promote partnerships, in short, work together to be stronger.

In the midst of these transformations, Aéro Montréal created the Supply Chain Development Working group. Composed of 13 individuals representing stakeholders from the aerospace supply chain, the group's mandate is to oversee the planning, coordination and implemen-

tation of a concerted action plan to respond to the major issues of subcontracting and, ultimately, to increase the competitiveness of Québec aerospace suppliers. It also aims to strengthen the Québec aerospace supply chain vis-à-vis international competition. To date, the group's work has generated valuable courses of action and a structuring initiative that will benefit the entire industry.

As chairman of the Working Group, I'd like to recognize the hard work of all the cluster members to make the Québec supply chain a world-class model. It is by pooling our strengths that we will ensure the competitiveness of our industry over the long term.

Philippe Hoste

Chair of Aéro Montréal's Supply Chain Development Working Group

CEO, Sonaca Montréal

SUPPLY CHAIN DEVELOPMENT WORKING GROUP

CHAMPION:
Philippe Hoste
Chief Executive Officer
Sonaca Montréal

Sam Abdelmalek
Vice President
Supply Management
Pratt & Whitney Canada

Claire Auroi
Director, Supply Chain
Contracts & Corporate
Social Responsibility
Bombardier Aerospace

Anne-Marie Bertrand
Logistic Director/
Directrice Logistique
MECAER AMERICA Inc.

Marc Bourret
Vice President,
Commercial Value Stream
Bell Helicopter
Textron Canada

Martin Brassard
Vice President General
Manager
Héroux-Devtek
Landing Gear Division

François Chagnon
President
Précision SF Tech

MarieChantal Chassé,
Eng.
President and Chief
Executive Officer
JMJ Aéronautique

Janice Davis
Vice President and Chief
Procurement Officer
Bombardier Aerospace

Marc-André Duranceau
Vice President Aerostructure
L-3 Communications MAS

Éric Faucher
President
Marquez Transtech

Robert Leclerc
Vice President, Global
Training Operations and
Simulation Products, Civil
CAE inc.

Hon. Jacques Saada
President & CEO
AQA

To carry out its mandate, Aéro Montréal's Supply Chain Development Working Group has established seven sub-committees responsible for developing a framework to implement the MACH initiative. In all, 51 people are involved in the group's work and its seven subcommittees.

The Supply Chain Development Working Group and its subcommittees held a total of 22 meetings in 2010 (Appendix B – Chart of contributions in kind per sector 2010).

WORKING GROUP ACCOMPLISHMENTS

In 2010, the Supply Chain Development Working Group worked to define guidelines and implement the new initiative to optimize the Québec supply chain. Members of the working group all got together to promote the implementation of this cooperative model which supports the long-term strategic growth of the sector.

MACH initiative:

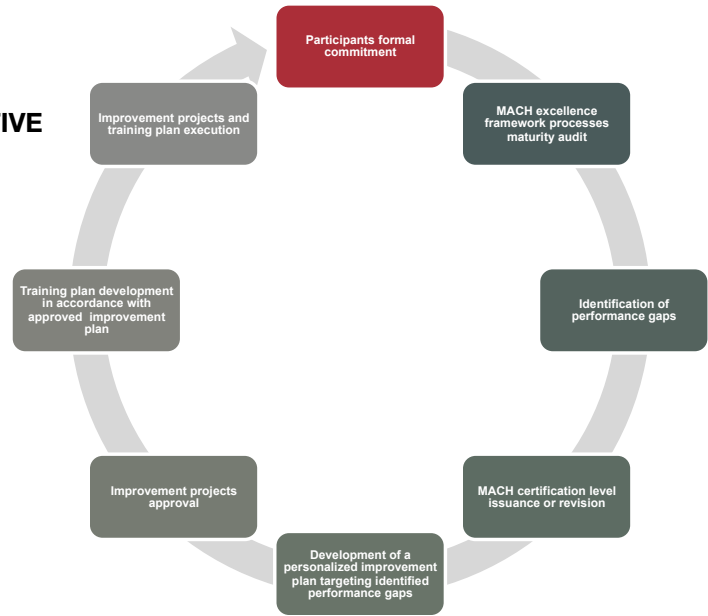
A unifying model to optimize the supply chain

Endorsed by the Board of Directors in September 2009, the supply chain optimization initiative, previously called C2A2, was the group's focal point of work in 2010. In order to accelerate the implementation, a contracted resource person dedicated to the MACH initiative, Martin Hamel, was specially hired by Aéro Montréal. While the strategic directions and objectives of the initiative had already been established, the program details and guiding principles remained to be defined. To guide their thinking, members of the working group first conducted a benchmarking of similar programs around the world and came together to establish the guiding principles of this unifying model. To ensure the promotion and recognition of this initiative, a new and more evocative name was developed along with a logo largely inspired by Aéro Montréal's graphic identity. The name MACH, referring at the speed of sound, was approved by members of the working group and by the Board. This new name evokes optimization, transcendence, innovation and speed; intrinsic values of the unifying model.



Launching the MACH initiative at the Farnborough Airshow in the presence of Minister Clément Gignac, Janice Davis, Vice President and Chief Procurement Officer, Bombardier Aerospace and Champion of the initiative, Gilles Labbé, Chairman of Aéro Montréal and President and CEO of Héroux-Devtek, as well as Philippe Hoste, Chair of the Supply Chain Development Working Group and CEO of Sonaca Montréal.

GENERAL PROCESS OF THE MACH INITIATIVE



The MACH initiative was officially launched during the Farnborough International Airshow in the presence of Minister Clément Gignac, Janice Davis, Vice President and Chief Procurement Officer, Bombardier Aerospace and Champion of the initiative, Gilles Labbé, Chairman of Aéro Montréal and President and CEO of Héroux-Devtek, and Philippe Hoste, Chair of the Supply Chain Development Working group and CEO of Sonaca Montréal. The aim of the MACH initiative is to optimize the performance of Québec's aerospace supply chain by strengthening companies and the structure of the supply chain. It will do this by leveraging collaboration between customers and suppliers as well as by ensuring the implementation of strategies and projects that help bridge gaps in integration capacity in Québec. It strives to develop a world class supply chain.

Centered on a program to enhance the competitiveness of suppliers, including a performance label, all the measures deployed under the MACH initiative allow suppliers to position themselves, identify their improvement opportunities and work on them. Mechanisms to develop or attract world class integrators will be implemented in collaboration with the various cluster partners to strengthen weak links in the Québec aerospace supply chain.

The MACH initiative will be deployed over five years under the mentorship of Bombardier Aerospace. The first year of operation, planned for 2011, will reach about 20 Québec suppliers who will benefit from services offered under the initiative as well as from the expertise and support of more than seven world-class prime contractors. The initiative will progressively make available to participating companies services, tools and methodologies to evaluate and improve their performance and market position and further develop business opportunities.

The program will include services such as:

- an organizational performance diagnostic;
- support to achieve a continuous improvement plan based on action priorities;
- tailored training programs;
- mechanisms for measuring performance and benchmarking at the national and international levels;
- tools for disseminating information and strategic monitoring;
- a plan to promote visibility of companies that demonstrate an improvement in performance, at both the national and international level.

The guiding principles of the MACH initiative were approved by the working group last September. Since then, four working groups and three subgroups have been established to define the structure for funding the initiative and the three component programs, including:

- Supplier Competitiveness Development Program (the MACH excellence framework)
- Workforce Skills Development Program
- Visibility and performance recognition program

In addition, Aéro Montréal has applied for funding from the three levels of government for the implementation and administration of the MACH initiative over five years. The operating budget, funded by public and private sources, will allow 70 companies, in five annual cohorts, to integrate the performance optimization program, or one-third of members of the Québec supply chain.



Best practices forums



Presentation of the MACH initiative at AQA's annual meeting and during the STIQ's Buyers/Suppliers Day.

Promoting the MACH initiative

After its official launch, Aéro Montréal organized a tour to promote the MACH initiative. An initial presentation of the initiative was conducted during AQA's annual meeting, which brought together nearly 200 participants, including 94 SMEs. A second presentation under the theme: The Transformation of the Québec aerospace supply chain, a must!, was given by Philippe Hoste to more than 300 guests during Buyers/Suppliers Day organized by Sous-traitance industrielle du Québec (STIQ). On this occasion, Martin Wright, Managing Director of NWWA, visiting Québec on the invitation of the cluster, also presented details of the ASCE program. Both events generated significant interest and an impressive number of questions from the public.

Best practices forums

Begun in 2009, best practices forums continued in 2010. Two conferences were held, thus concluding the series of three events planned in the working group's master plan. A luncheon conference on best practices in project management was held by Bombardier Aerospace and one of its Five Star suppliers, the company Abipa. This event, organized in collaboration with the AQA and STIQ, was well received by participants.

The final conference, under the theme of operations management, was held in partnership with STIQ and CTA at the Complex Bell in Brossard. The presentations highlighted the benefits of participating in a supplier development program and using the services of a technology transfer centre, in this case the CTA, for support in the implementation of improvement projects. Two case studies were presented: Hemmingford Aerospace and Groupe Meloche, two participants in the UTC Supplier Gold Program of Pratt & Whitney Canada.

Study for developing the Québec aerospace supply chain's integration capabilities

Finally, the working group commissioned SECOR to produce a comprehensive study on the development of integration capabilities of the Québec supply chain. The study aimed to identify the weak links of the chain in integration capabilities and make recommendations for developing or attracting world-class integrators in Québec. A business case for lobbying the government was developed to obtain financial support for the operation of the MACH initiative which will benefit the entire supply chain.





GLOBAL SUPPLY CHAIN SUMMIT

Aéro Montréal, in conjunction with AQA, held the first-ever edition of the Global Supply Chain Summit on April 29 at the Palais des congrès de Montréal as part of the Québec aerospace industry's drive to strengthen its local supply chain.

The event was held as part of Aëromart Montréal 2010, the largest networking forum between manufacturers, suppliers and all the clusters of suppliers or subcontractors of aviation services internationally. Under the theme "A Global Supply Chain for a Global Economy: Challenges and Opportunities in the Aerospace industry," the Global Summit Supply Chain Summit brought together over 260 participants and experts from the Canadian and international aerospace industry supply chain.

Philippe Hoste, Chief Executive Officer of Sonaca Montréal and Chair of Aéro Montréal's Supply Chain Development Working Group, and Suzanne M. Benoît, CEO of Aéro Montréal, co-chaired the event. Janice Davis, Vice President and Chief Procurement Officer, Bombardier Aerospace, and Honorary Chair of the event, delivered the opening speech in which she reiterated the importance for Québec companies to move towards more competitive and innovative models in order to integrate into the global supply chain and respond to the needs of prime contractors.

Québec's aerospace sector benefited from the Summit to present major challenges surrounding the accelerated globalization of the supply chain and the need to continue and intensify its efforts to better integrate all members of the aerospace cluster.

In total, more than 10 internationally renowned supply chain experts spoke at the Summit, including Maurice Perrault, President of SPACE, and René Colin, Opera-

tions Manager of SPACE, Pradeep Fernandes, The Boeing Company - Supply Chain Strategy – Commercial Airplanes, Bruce Simpson, Global Leader of McKinsey & Company's Operations Practice, and Ms. Jacqueline Khougaz, Senior Manager, Supply Chain of Pratt & Whitney Canada, to name a few.

In addition, participants learned about managing a supply chain oriented towards innovation and environmental protection. Claude Ouimet, Senior Vice President and General Manager, Canada and Latin America, InterfaceFLOR, spoke about the company's sustainable development approach. InterfaceFLOR, a world leader in the production of modular floor coverings and textiles, is committed to eliminating any negative impact that the company may have on the environment by 2020. To do this, it is directly influencing its supply chain and favouring suppliers that will help it achieve its objectives.

By holding this unique summit, the aerospace cluster was able to identify global trends in managing the supply chain. The findings that emerged have helped the strategic thinking of the Supply Chain Development Working Group and further develop actions that will allow our local supply chain local to meet the challenges of today and remain competitive with international competition. Following the success of the summit, it has been recommended to hold this event on a regular basis.



GLOBAL SUPPLY CHAIN SUMMIT



Human Resources Working Group: TRAINING THE NEXT GENERATION



The Québec aerospace sector is a model of excellence and is known internationally for its highly specialized workforce. In Québec, one in 200 people work in this sector, the highest density of employment worldwide.



Aerospace is a sector of the future. Its sales have increased by an average 7.9 % a year for the last 26 years – despite the current difficult economic context it is facing. The major industry players have maintained their investments during this period and are preparing themselves for the economic recovery.

One of the major issues executives must take into account is planning for workforce succession. With an aging population and a reduction in its active workforce, Québec faces a major demographic challenge that could affect generational renewal in our companies. To ensure a competent succession starting now, Aéro Montréal launched in 2008 the Human Resources Working Group composed of 16 executives from the sector, including human resources professionals and leaders of educational institutions.

The Québec aerospace sector is a model of excellence and is internationally recognized for its highly skilled workforce. In Québec, one in 200 people work in this sector, the highest density of employment worldwide. The working group aims to develop a concerted action plan to address major issues of succession and manpower while maintaining the industry's competitiveness.

Since its inception, the Human Resources Working Group has taken concrete steps to stimulate the interest of young people in aerospace and encourage them to continue their studies. As Chair of the working group, I am convinced that the success and future of our industry is based on the highly-skilled men and women who work there. Together, we will help create the next generation of aerospace managers, technicians and engineers.

John Saabas

Chair of Aero Montréal's Human Resources Working Group
President, Pratt & Whitney Canada

HUMAN RESOURCES WORKING GROUP

CHAMPION
John Saabas
President
Pratt & Whitney Canada

Pierre Boisseau
Adviser
MESS (observer)

Serge Brassat
College President and Director, École nationale d'aérotechnique ÉNA

Jacques Cabana
President & General Manager
FDC Composites Inc.

Réjean Charbonneau
Directeur des services aux entreprises et des mesures de formation
Emploi Québec (Observateur)

Clément Fortin
President and CEO
CRIAQ

Gilbert Guérin
Corporate Director, Human Resources
Héroux-Devtek

Zsolt Kekesi
Senior Director, Talent Acquisition
Bombardier Aerospace

Claude Lessard
President
Delastek

Hany Moustapha
Professor and Director of Aerospace Programs
Ecole de technologie supérieure
Senior Technology Advisor
Pratt & Whitney Canada

Josée Péloquin
Director
ÉMAM

Anouk Rivard
Human Resources Representative
Messier-Dowty Montréal

Jean-Marc Rochon
Advisor, Industrial Development
MDEIE (observer)

Jean-Denis Roy
Vice President
Human Resources
Esterline CMC Electronics

Kevin P. Smith
Vice President
Human Resources
Pratt & Whitney Canada

Serge Tremblay
Executive Director
CAMAQ

The Working Group held a total of 3 meetings in 2010 (Appendix B – Chart of contributions in kind per sector 2010).



Aéro Montréal Booth at Eurêka Festival!

WORKING GROUP ACCOMPLISHMENTS

In 2010, the Human Resources Working Group worked towards building, today, an available and qualified workforce for tomorrow. Specifically, it focused on motivating young people to pursue their studies and to generate interest in aerospace.

Follow-up of 2009 actions

At the start of the year, the working group followed up on six actions started in 2009. It helped ÉMAM develop courses in enriched mathematics and physics. To date, 10 students have been able to continue their training enabling them to obtain the necessary prerequisites to be admitted to ÉNA. At the same time, ÉNA and ÉMAM have established a bridge between the two institutions. Now, a case-by-case system will allow for recognition of credits between the course curriculums. Working group members will submit in 2011 a second request with the MELS for a continuity program.

The results of the survey on reasons for dropping out of ÉNA revealed that the dropout rate was within the average of colleges. Some 36% of young people obtain their college diploma (DEC) within the normal period. This proportion increases to 57% for graduation in five years. The study shows that young people are stretching their studies beyond the usually prescribed time, a trend confirmed in the majority of colleges. Moreover, many students work for the industry before obtaining all the credits necessary for graduation. For these youths, the working group proposed action plans to accelerate and facilitate the graduation rate and increase their retention in the aerospace workforce labour pool, such as enrolment in ÉMAM. Finally, the working group urged industry members to introduce shadow internships. Both Pratt & Whitney Canada and Bombardier Aerospace hosted ÉMAM students during the year.

Eurêka Festival!

Aéro Montréal participated in the Eurêka Festival for a second year. This large science and technology gathering was held in the Quays of the Old Port and the Montréal Science Centre in mid-June. On this occasion, the working group helped to promote careers in aerospace. In collaboration with the SAE Foundation and Greater Montréal's Conseil du Loisir Scientifique, over 800 young people had the opportunity to test scientific principles related to the flight of aircraft by constructing gliders and by participating in science demonstrations.

Academos

Academos is a company-led mentoring program designed to help young people aged 14 to 16 years make career choices. The program encompasses 245 schools and reaches over 16,000 young people. The network consists of 2,300 volunteer mentors from 79 companies. While being the third-largest industry in Québec, it was noted that the aerospace sector is under-represented in this program with only 10 mentors. As part of a plan to establish a program of ambassadors for aerospace, the working group is focusing on increasing the pool of mentors in Academos in 2011.

Conseil emploi métropole

Finally, the CEO of Aéro Montréal was invited to serve on the Board of Directors of the new Conseil emploi métropole (Greater Montreal employment plan) as sector representative for the aerospace cluster. Officially launched on November 5 under the terms of the city employment plan by Julie Boulet, Minister of Employment and Social Solidarity, the Conseil emploi métropole's main objective is to rally, around common issues related to employment, the main players involved in the Metropolitan Montréal's economic development.



“THE SKY IS THE LIMIT!”

As part of the industry’s commitment to the cause of school retention and its desire to promote young people’s interests in aerospace careers, the Human Resources Working Group launched “The sky is the limit” project in the fall featuring a series of science presentations deployed in schools in Greater Longueuil. The aerospace industry has chosen to intervene at the elementary school level to encourage young people to build their dreams and pursue professional careers. Through an educational activity that is fun and formalized, tailored for the elementary school level, the pilot project aims to demystify the world of aerospace and promote exciting careers in the sector among Grade 5 and 6 students.

This initiative was launched in association with the Conseil du Loisir Scientifique de la région Métropolitain (CLSM) and the Foundation of the Society of Automotive Engineers of Canada (SAE), along with the financial support of the Conférence régionale des élus de l’agglomération de Longueuil (CRE) and the involvement of Pratt & Whitney Canada. It allows young people to put themselves in the shoes of an aerospace engineer during class presentations. This innovative program, interactive and representative of the real labour market, goes beyond the scope of traditional academic training. By emphasizing three components of learning – scientific notions, a practical approach and experimentation – the two-hour presentations expose young elementary students to concrete activities and experiences.

Students were first introduced to the forces acting on an airplane in flight, notions intrinsic to the construction of an aircraft. Then, technicians and engineers from Pratt & Whitney Canada visited schools and shared with the students their career paths within the aerospace industry. In all, eight employees became ambassadors of “The sky is the limit!” program. Finally, the budding engineers entered a team competition where they had to build gliders respecting the four principles of physics learned beforehand.

After this pilot, more than a dozen elementary schools in Longueuil, Saint-Lambert Saint-Bruno-de-Montarville, Brossard, Saint-Hubert and Greenfield Park, from varied socio-economic environments, was included in the initiative and almost 750 Grades 5 and 6 students in the South Shore took part in the science presentations. This initiative has been received with great enthusiasm. The assessment of activities by both teachers and students has been extremely positive. Building on the success of the pilot project, the working group plans to deploy “The sky is the limit!” program in the Mirabel area, on the Island of Montréal and in Montérégie-Est in 2011.

Aéro Montréal formalized the deployment of the initiative at a press conference in January 2011 in a school in Greater Longueuil. For the occasion, the school gym resembled a real runway. Attending journalists were able to participate in a demonstration flight of gliders made by students who took part in activities last fall. In addition, the cluster has the opportunity to reaffirm its support for the cause of student retention and academic success. This was confirmed in 2008 by the signing of collaborative arrangements with regional agencies working actively with the school boards of Greater Montréal.



“The students were proud to see their aircraft fly.”

Marie-Martine Montuoro

*Normandy School
December 13, 2010*



"The sky is the limit!" workshops

Press conference to officially launch the "The sky is the limit" program attended by Benoît Brossoit, Senior Vice President, Global Operations at Pratt & Whitney Canada, and Hélène Séguinotte, Executive Committee member of Aéro Montréal and national delegate of SAFRAN Group.



"Students were able to formulate hypotheses, build and test their gliders. Awesome."

Nancy Jutras
*Terry Fox School
 December 10, 2010*

National Security and Defence Working Group: MAXIMIZING THE SPINOFFS



Canadian military procurement program contribute to the growth of aerospace companies and generate considerable spinoffs across Canada and Québec.



The Canadian defence industry is a cornerstone of domestic security and economic growth. These major contracts support innovation, maintain stimulating and high value-added jobs, and contribute to the health of our industry.

Moreover, companies benefiting from military contracts are able to demonstrate their capabilities and their competitiveness internationally. Their expertise can be leveraged through new programs, both in the military and civil aviation sectors.

Although Québec's aerospace industry represents 55% of Canadian aerospace production, it is not known for its military vocation. To take advantage of the potential spinoffs of federal government military procurement, in 2008 Aéro Montréal established the National Security and Defence Working Group composed of 14 individuals from three areas of the industry involved in the defence and security markets. The working group's mandate is to assure the planning, coordination and implementation of a

concerted action plan to respond to the major issues of defence and civil security and promote the industrial capacity of the Québec's aerospace cluster in matters of national security.

As Chair of the National Security and Defence Working Group, I am convinced that the mobilization of our members and the strategies developed this year will allow the cluster to maximize benefits of these large contracts for our industry. It is by having a strategic vision for the defence industry that the cluster can help Québec companies earn a place in the military supply chains and protect and create thousands of high-quality and well paying jobs.

Martin Gagné

Chair of Aéro Montréal's National Security and Defence Working Group

Group President, Products and Training & Associated Services - Military, CAE inc.

NATIONAL SECURITY AND DEFENCE WORKING GROUP

CHAMPION
Martin Gagné
*Group President
Military Products
and Training & Services
CAE inc.*

Benoît Arcand
*Director, Canadian
Government Programs
Bell Helicopter Textron
Canada Limited*

Richard Bastien
*Vice President
Business Development
L-3 Communications MAS*

Giovanni Bevilacqua
*Vice President-Business
Development
Alta Precision*

Stéphane Blais
*Project Director,
Flight Operations
Marinvent*

Jean Michel Comtois
*Vice President, Marketing
and Sales, Governmental
and Public Affairs
Esterline CMC Electronics*

James Crone
*First Product Director,
Business Development
Military Programs
Pratt & Whitney Canada*

Jean Gravel
*Vice President,
Sales and Marketing
Landing Gear Division
Héroux-Devtek Inc.*

David Jurkowski
*Vice President
Government Relations
& Aircraft Sales
Support - CANADA
Specialized and Amphibious
Aircraft Division
Bombardier Aerospace*

Marcel Landry
*Vice President, Business
Development
Thales Canada Inc.*

Sylvain Lefrançois
*Operations Director
Sagem Canada*

Hon. Jacques Saada
*President & CEO
AQA*

Gérald Tremblay
*Grand Lodge
Representative
AIMTA*

Daniel Verronneault
*Vice President Government
Relations and Business
Development
GE International Inc.*

To accomplish its mandate, Aéro Montréal's National Security and Defence Working Group has established two subcommittees responsible for developing the various elements of the Strategic Plan of Defence. In all, 31 people are involved in The Working Group's main and its two subcommittees.

The group and its sub-committees held a total of 17 meetings in 2010 (Appendix B – Chart of contributions in kind per sector 2010).



Aéro Montréal attended F-35 related contract announcements at Héroux-Devtek and Pratt & Whitney Canada in the presence of Ministers Rona Ambrose and Denis Lebel.

WORKING GROUP ACCOMPLISHMENTS

During 2010, the National Security and Defence Working Group strived to implement a concerted strategy on defence and national security and promote the interests of Québec aerospace industry players in terms of industrial benefits related to military contracts.

Launch of Group

The beginning of the year was largely devoted to the official launch of the National Security and Defence Working Group. To this end, the team charter and mission statement were finalized and endorsed by the Board in June.

Strategic Plan on Defence

The Working group's main objective was to deliver an aerospace strategy for defence and security from two perspectives: the government component and the industry and infrastructure component. This plan will present a cluster strategy to take advantage of current and future opportunities in the national security and defence sector as well as maximize industrial benefits for Québec and Canada. To do this, two subcommittees were put in place. The government committee's mandate is to intervene in a strategic and targeted way with various government and para-governmental authorities to ensure that investments in defence and national security generate maximum economic benefits for cluster members. In addition, the committee is identifying issues related to defence, developing a list of various supply projects, and government policies on defence. Members worked on an intervention plan to position the cluster to respond to the future requirements of identified projects. This will include recommendations on government procurement policies, to fill the gaps as well as available industrial capacity within the Québec aerospace cluster. The intervention plan will be submitted in 2011. This will be followed by a lobbying plan that will be put in place to promote Québec's industrial capacity in the area of defence.

For its part, the industries and infrastructure committee has a mandate to actively promote the maintenance and development of key industrial competencies to meet the needs, present and future, of government and quasi-governmental organizations and thus ensure the sustainability of Québec's leadership on the world stage. The committee members first identified industrial capabilities and existing infrastructures in defence in Québec to establish a linkage between the skills available and the needs of the Department of Defence and analyze gaps. The results of these analyses and the recommendations of the subcommittee will be included in a strategic action plan to be presented to the Working Group's governmental committee. The strategic plan on defence will be submitted to the Board in 2011.

Intervention Committee on the F-35

As part of the announcement of the acquisition of the 5th generation F-35 Joint Strike Fighter by the federal government, the working group formed an intervention committee to maximize the industrial benefits for Québec. Aéro Montréal was first invited to position itself in the public arena on this purchase. Consequently, the cluster has issued various press releases in support of the program and participated in a round of press conferences introducing companies participating in the F-35 global supply chain. In addition, Aéro Montréal participated in a mission to Lockheed Martin in Fort Worth at year end where many contacts were established. Other actions in the context of this committee will be launched in 2011.

AÉRO MONTRÉAL: AN INCREASINGLY STRONG MOBILIZATION

Sector participation within Aéro Montréal's organizations reached new highs. Both through in administrative bodies, working groups as well as events that it organizes, the Québec aerospace cluster is continuing to increase participation and engagement.

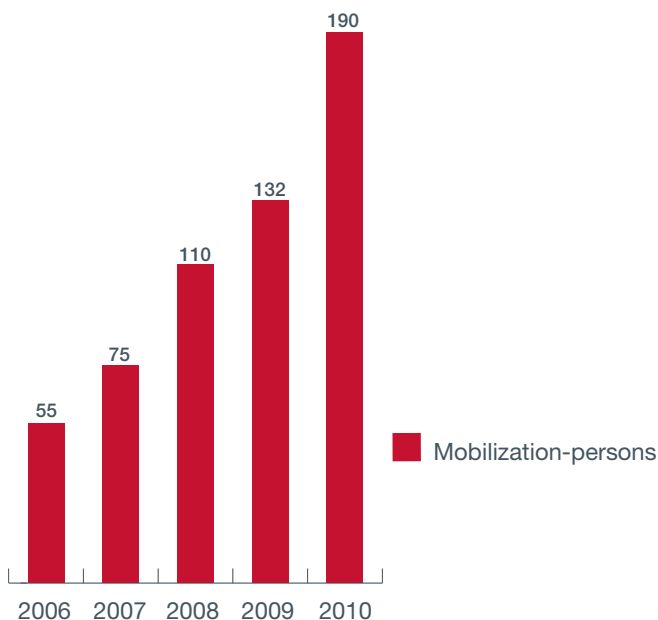
MOBILIZATION

In 2010, Aéro Montréal was able to rely on 190 participants in its various bodies (Board, Executive Committee, working groups and committees). This is a significant increase since the number of volunteer professionals working to the benefit of Aéro Montréal in 2009 was 132. (See chart Evolution of the mobilization 2010).

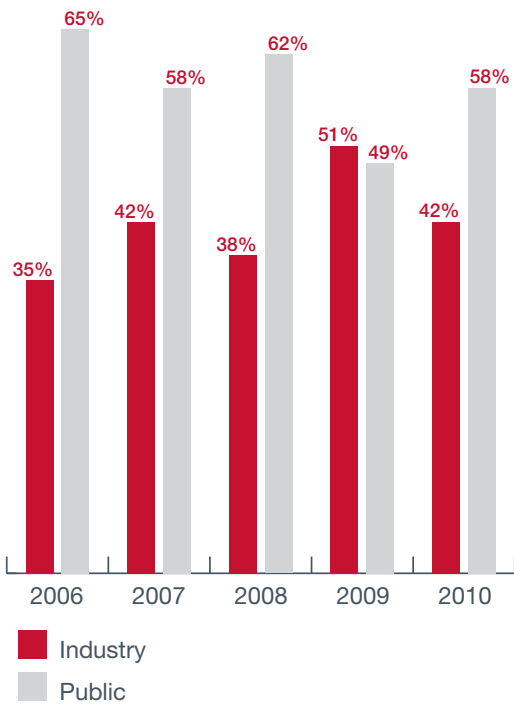
This increase is primarily attributable to the Supply Chain Development Working Group and its seven subcommittees that have mobilized 51 professionals to develop the MACH initiative. In addition, work to develop a strategic plan for the Québec industry in defence required the involvement of 31 professionals involved in the National Security and Defence Working Group and its two subcommittees. Finally, the year 2010 witnessed a new type of sector contribution to the work of Aéro Montréal. Ten volunteers from

Pratt & Whitney Canada, engineers and technicians, were the first cohort of the aerospace ambassadors program to support the "The sky is the limit!" program to raise awareness among Grade 5 and 6 students about technical and science careers. In total, 63 meetings were held during the year, the equivalent of more than 140 hours of meetings across the various bodies and working groups of Aéro Montréal.

EVOLUTION OF THE MOBILIZATION 2010



EVOLUTION OF TOTAL CONTRIBUTIONS



	2006	2007	2008	2009	2010
Industry	\$340,675	\$500,375	\$428,700	\$1,058,696	\$656,892
Public	\$629,325	\$712,625	\$707,600	\$1,024,398	\$894,484
Total	\$970,000	\$1,213,000	\$1,136,300	\$2,083,094	\$1,551,376

DISTRIBUTION OF PUBLIC AND INDUSTRY CONTRIBUTIONS

2009

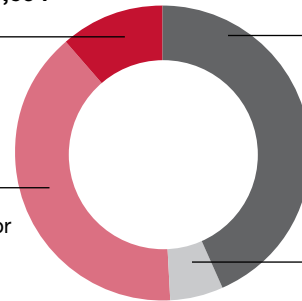
TOTAL \$2,083,094

Contribution in cash
Industry
\$233,900
11.2%

Contribution in kind per sector
Industry
\$824,796
39.6%

Contribution in kind per sector
Public
\$903,298
43.4%

Contribution in cash
Public
\$121,100
5.8%



2010

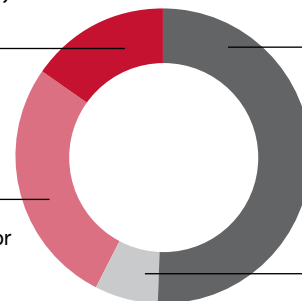
TOTAL \$1,551,376

Contribution in cash
Industry
\$235,600
15.2%

Contribution in kind per sector
Industry
\$421,292
27.1%

Contribution in kind per sector
Public
\$786,334
50.7%

Contribution in cash
Public
\$108,150
7.0%





APPENDIX



PRESENTATIONS AND MEETINGS 2010	
DATE	MEETINGS
February	Tecknowmetrix, France
	Mission in the Region of Puglia, Italy
	Academos
March	Society of Automative Engineer Foundation
	Rio Tinto Alcan
	Quebec Delegation in London
April	Aerospace Human Resouces Concertation Group
	Délégation d'Auvergne
	Delegation from the Region of Puglia, Italy
	U.S. Aerospace Supplier Mission to Canada 2010
May	Panel with Quebec delegates abroad
	Ensco
June	Ellison Technologies
	47th Annual Canadian Aviation Historical Society (CAHS)
	Hawker Beechcraft
	Unit (Aeronautics) European Commission
July	France Permanent representative ICAO
August	Aerospace Valley
	TAS Aéronautique
	Ottawa National Defence
September	Conseil des loisirs scientifiques de Montréal
	Korean Delegation
	Lombardie Delegation
	Round Table on Innovation (Alenia), Ottawa
October	AXIS Saxony
	North West Aerospace Alliance
	Skywin Wallonie
November	Delegation of Pôle Pégasse
	Bordeaux Technowest
	Phoenix City Government Mayor
	Canada-Arizona Business Council
	International Business Opportunities - Foreign Affairs
	Delegation of Pôle Pégasse
	Provence-Alpes-Côte d'Azur Region
	Info-Trust, Phoenix, Arizona
	Université de Montréal
	Symposium France-Québec
December	2MORO
	Aerospace Innovation Forum Toulouse
	Federal Business Development Bank

IN-KIND CONTRIBUTIONS 2010								
Committee	Duration (hours)	Total number of participants	Number of private participants	Cost (\$-hour-participant)	Room, food, phone)	Other contributions	Total industry	Grand total
General Annual Meeting								
Meeting April 16	1	101	58	\$200	\$3,000		\$11,600	\$23,200
Board of Directors								
Meeting February 24	2	21	12	\$400	\$1,000		\$9,600	\$17,800
Meeting April 16	0.5	21	15	\$400	\$1,000		\$3,000	\$5,200
Meeting June 16	2	21	12	\$400	\$1,000		\$9,600	\$17,800
Meeting September 30	3	26	14	\$400	\$1,000		\$16,800	\$32,200
Meeting December 15	2.5	18	13	\$400	\$1,000		\$13,000	\$19,000
							\$52,000	\$92,000
Executive Committee								
Meeting January 20	1.5	5	5	\$400	\$150		\$3,000	\$3,150
Meeting February 24	2.5	5	5	\$400	\$250		\$5,000	\$5,250
Meeting June 16	2	4	4	\$400	\$200		\$3,200	\$3,400
Meeting September 30	1.5	5	5	\$400	\$200		\$3,000	\$3,200
Meeting November 5	2	5	5	\$400	\$200		\$4,000	\$4,200
Meeting December 15	2	5	5	\$400	\$200		\$4,000	\$4,200
							\$22,200	\$23,400
Branding and Promotion Working Group								
Meeting February 26	2	10	7	\$200	\$200		\$2,800	\$4,200
Meeting August 30*	2	1	1	\$200	\$50		\$400	\$450
Meeting September 21	1	10	6	\$200	\$200		\$1,200	\$2,200
Meeting December 13	1.5	5	3	\$200	\$50		\$900	\$1,550
							\$5,300	\$8,400
Innovation Working Group								
Meeting February 12	2	9	6	\$200	\$200		\$2,400	\$3,800
Meeting August 31	3	10	7	\$200	\$300		\$4,200	\$6,300
Meeting November 2	3	15	10	\$200	\$300		\$6,000	\$9,300
Meeting November 9	3	11	8	\$200	\$300		\$4,800	\$6,900
							\$17,400	\$26,300
SAGE Working Group								
Meeting September 3 **	0.5	5	5	\$200	\$50		\$500	\$550
Meeting October 12	1	7	5	\$200	\$100		\$1,000	\$1,500
							\$1,500	\$2,050
Supply Chain Development Working Group								
Meeting March 9	2	8	6	\$200	\$200		\$2,400	\$3,400
Meeting May 28	2	10	8	\$200	\$200		\$3,200	\$4,200
Meeting June 23	2	9	7	\$200	\$200		\$2,800	\$3,800
Meeting August 30	3	7	6	\$200	\$300		\$3,600	\$4,500
Meeting September 14	2	7	5	\$200	\$200		\$2,000	\$3,000
Meeting October 5	2	11	9	\$200	\$200		\$3,600	\$4,600
Meeting November 18	2	8	6	\$200	\$200		\$2,400	\$3,400
							\$20,000	\$26,900
Global Supply Chain Summit Organizing Committee								
Meeting January 18	2	4	3	\$200	\$200		\$1,200	\$1,800
Meeting February 10	1	5	3	\$200	\$200		\$600	\$1,200
							\$1,800	\$3,000
Aeromart Organizing Committee								
Meeting January 18	2	17	8	\$200	\$200		\$3,200	\$7,000
Meeting March 30	2	11	6	\$200	\$200		\$2,400	\$4,600
Meeting April 23	2	5	3	\$200	\$200		\$1,200	\$2,200
							\$6,800	\$13,800

Committee	Duration (hours)	Total number of participants	Number of private participants	Cost (\$-hour-participant)	Room, food, phone)	Other contributions	Total industry	Grand total
MACH - PDF Working Group								
Meeting October 19	2.5	12	11	\$200	\$200		\$5,500	\$6,200
Meeting October 28	2.5	11	9	\$200	\$200		\$4,500	\$5,700
Meeting November 11	3	12	11	\$200	\$200		\$6,600	\$7,400
Meeting November 18	2	10	8	\$200	\$200		\$3,200	\$4,200
Meeting December 2 - RH	3	4	3	\$200	\$200		\$1,800	\$2,600
Meeting December 9- operations	3	4	3	\$200	\$200		\$1,800	\$2,600
Meeting December 16 - leadership	3	4	3	\$200	\$200		\$1,800	\$2,600
Meeting 17 December - operations	3	4	3	\$200	\$200		\$1,800	\$2,600
							\$27,000	\$33,900
MACH - FIN Working Group								
Meeting November 29	2	12	8	\$200	\$200		\$3,200	\$5,000
							\$3,200	\$5,000
MACH - PDC Working Group								
Meeting December 13	2	9	5	\$200	\$200		\$2,000	\$3,800
							\$2,000	\$3,800
Human Resources Working Group								
Meeting February 15	2	13	8	\$200	\$200		\$3,200	\$5,400
Meeting May 20	2	10	7	\$200	\$200		\$2,800	\$4,200
Meeting October 13	2	12	8	\$200	\$200		\$3,200	\$5,000
							\$9,200	\$14,600
Ambassadors "The Sky is the limit"								
Animations in November and December	2	29	29	\$100	\$-		\$5,800	\$5,800
							\$5,800	\$5,800
Defence and National Security Working Group								
Meeting April 9	2	12	9	\$200	\$200		\$3,600	\$5,000
Meeting April 23	2	11	9	\$200	\$200		\$3,600	\$4,600
Meeting June 11	2	11	8	\$200	\$200		\$3,200	\$4,600
Meeting July 13	2	11	9	\$200	\$200		\$3,600	\$4,600
Meeting August 13	2	9	7	\$200	\$200		\$2,800	\$3,800
Meeting September 29	2	7	6	\$200	\$200		\$2,400	\$3,000
Meeting November 4 **	0.5	4	4	\$200	\$200		\$400	\$600
							\$19,600	\$26,200
Governmental Sub-Committee								
Meeting September 3	3	6	5	\$200	\$200		\$3,000	\$3,800
Meeting October 7	3	5	4	\$200	\$200		\$2,400	\$3,200
Meeting November 18	6	6	5	\$200	\$200		\$6,000	\$7,400
Meeting December 10	4	5	4	\$200	\$200		\$3,200	\$4,200
							\$14,600	\$18,600
Industrial - Infrastructure Sub-Committee								
Meeting June 16	2	6	6	\$200	\$200		\$2,400	\$2,600
Meeting September 8	3	5	5	\$200	\$200		\$3,000	\$3,200
Meeting September 17 **	1	5	5	\$200	\$200		\$1,000	\$1,200
Meeting September 20	2	7	7	\$200	\$200		\$2,800	\$3,000
Meeting October 22	2	6	6	\$200	\$200		\$2,400	\$2,600
Meeting November 8	2.5	8	8	\$200	\$200		\$4,000	\$4,200
							\$15,600	\$16,800
TOTAL HOURS	140.5	692	504					
GRAND TOTAL							\$235,600	\$343,750

* Special meeting with the Champion

** Conference call

ACRONYMS AND ABBREVIATIONS

AIAC

Aerospace Industries Association of Canada

AIMTA

International Association of Machinists
& Aerospace Workers (IAMAW)

AQA

Quebec Aerospace Association

CAMAQ

Comité sectoriel de main-d'œuvre en aérospatiale

CLSM

Conseil du Loisir Scientifique de la région
Métropolitaine

CRÉ

Conférence régionale des élus

CRIAQ

Consortium for Research and Innovation
in Aerospace in Québec

DEC

Diplôme d'études collégiales

DES

Diplôme d'études secondaires

ÉMAM

École des métiers de l'aérospatiale de Montréal

ÉNA

École nationale d'aérotechnique

ÉTS

École de technologie supérieure

LESIAQ

Quebec Aerospace Integrated Systems Teaching
Laboratory

MDEIE

Ministry of Economic Development, Innovation
and Export Trade

MELS

Ministry of Education, Recreation and Sports

MESS

Ministry of Employment and Social Solidarity

MRO

Maintenance Repair and Overhaul

NWAA

North West Aerospace Alliance

R&D

Research and Development

SPACE

Supply chain Progress toward Aeronautical Community
Excellence

QRIS

Québec Research and Innovation Strategy (QRIS)

STIQ

Sous-Traitance Industrielle Québec



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Nota: in this document, the masculine form designates both women and men. It is used to relieve the text and facilitate the understanding

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